Manually Create a Contact

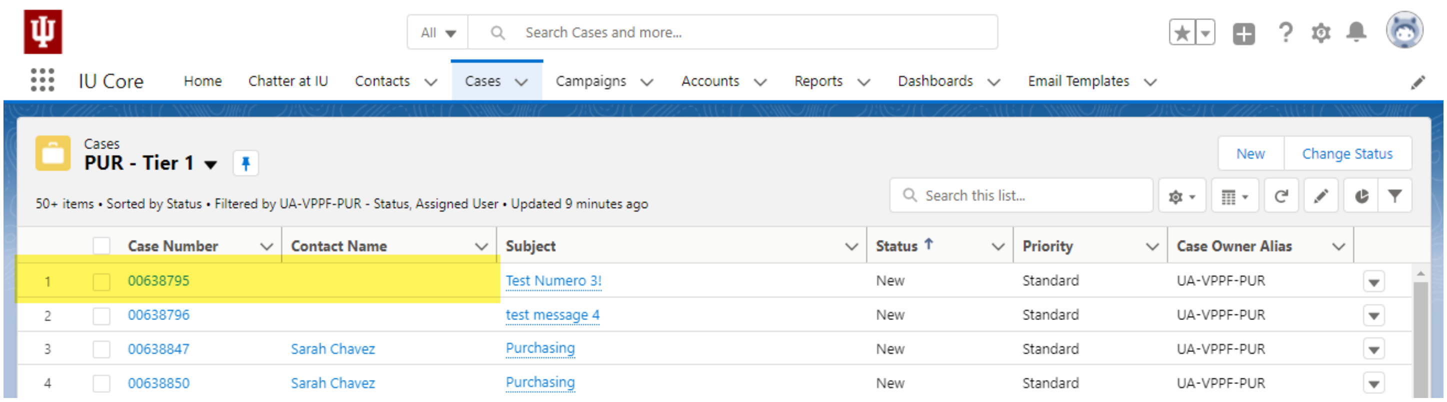
Contacts are used to capture information for individuals. By default, every IU employee and student have a contact profile in CRM.

When a new case is created, CRM will use the contact's last name and email address to match the new case with an existing contact. If CRM is not able to make a match, you will need to manually create a contact in CRM.

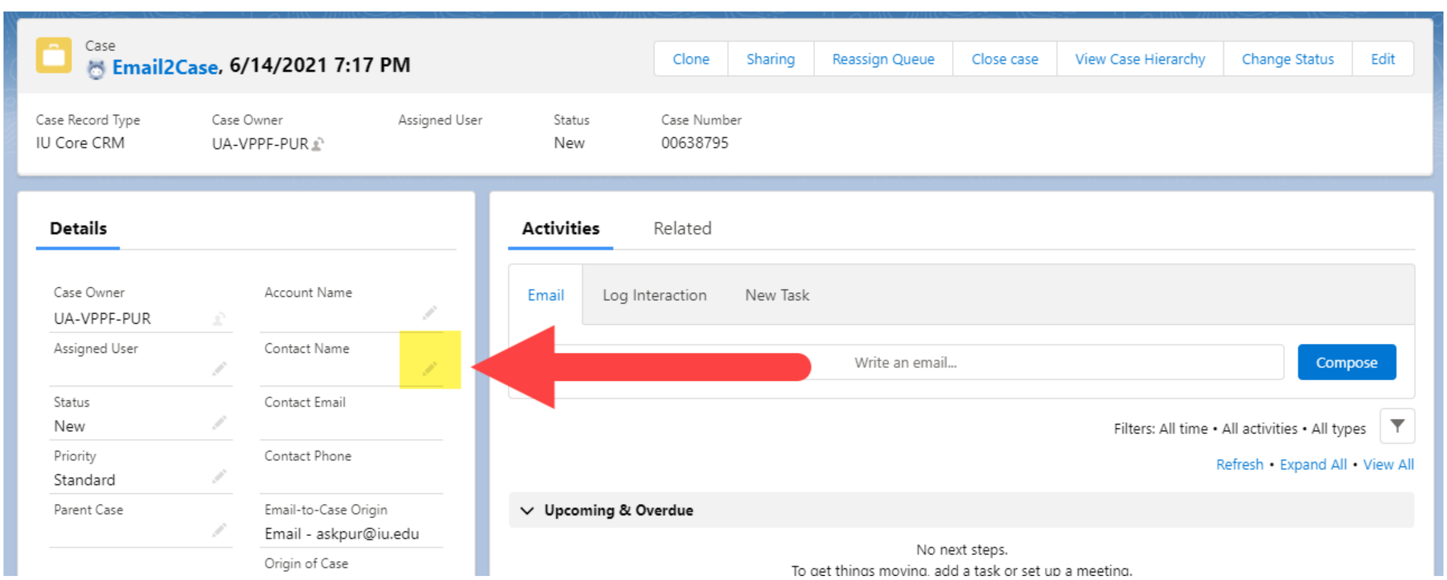
Contacts are visible to all CRM users – they are not limited to your CRM unit – so it is important to enter accurate information when creating a new contact.

You may need to create a contact when manually creating a case or when reviewing a new case. In the example below, a case was created but CRM was not able to associate it with a contact.

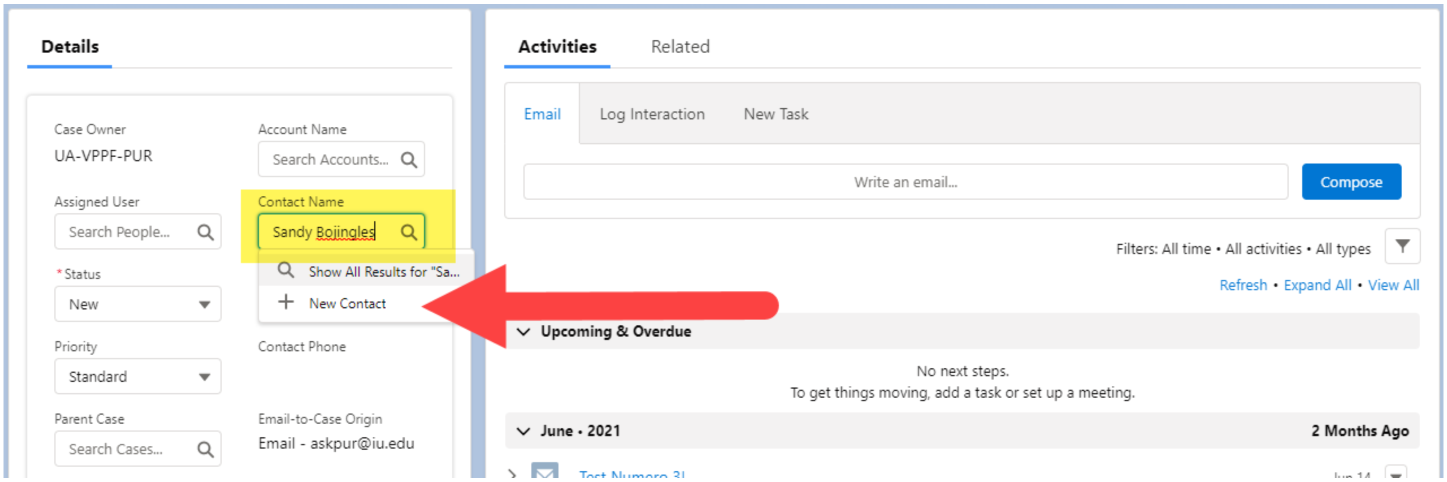
Click the **case number** to edit it.



Click the **pencil icon** in the Contact Name field to edit the field.

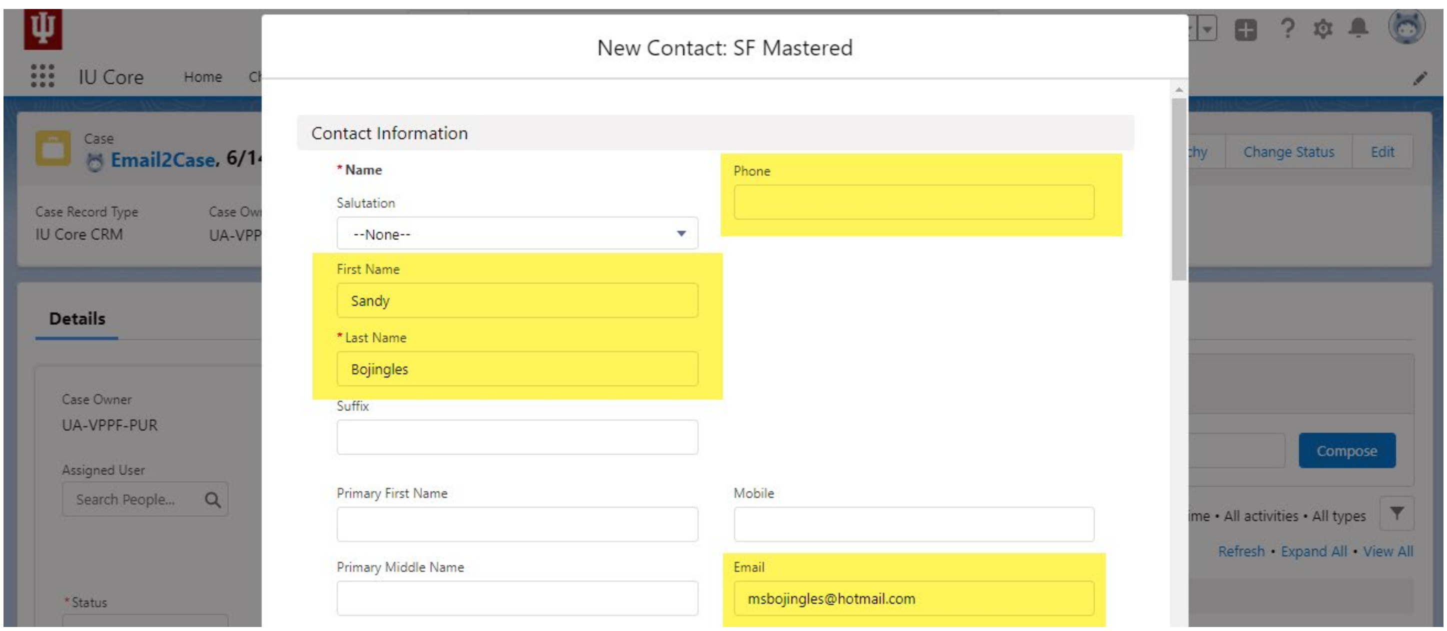


Search for the individuals first and last name one more time to ensure you aren't creating a duplicate contact. Assuming you don't find any results, click **+ New Contact** to create a new contact.



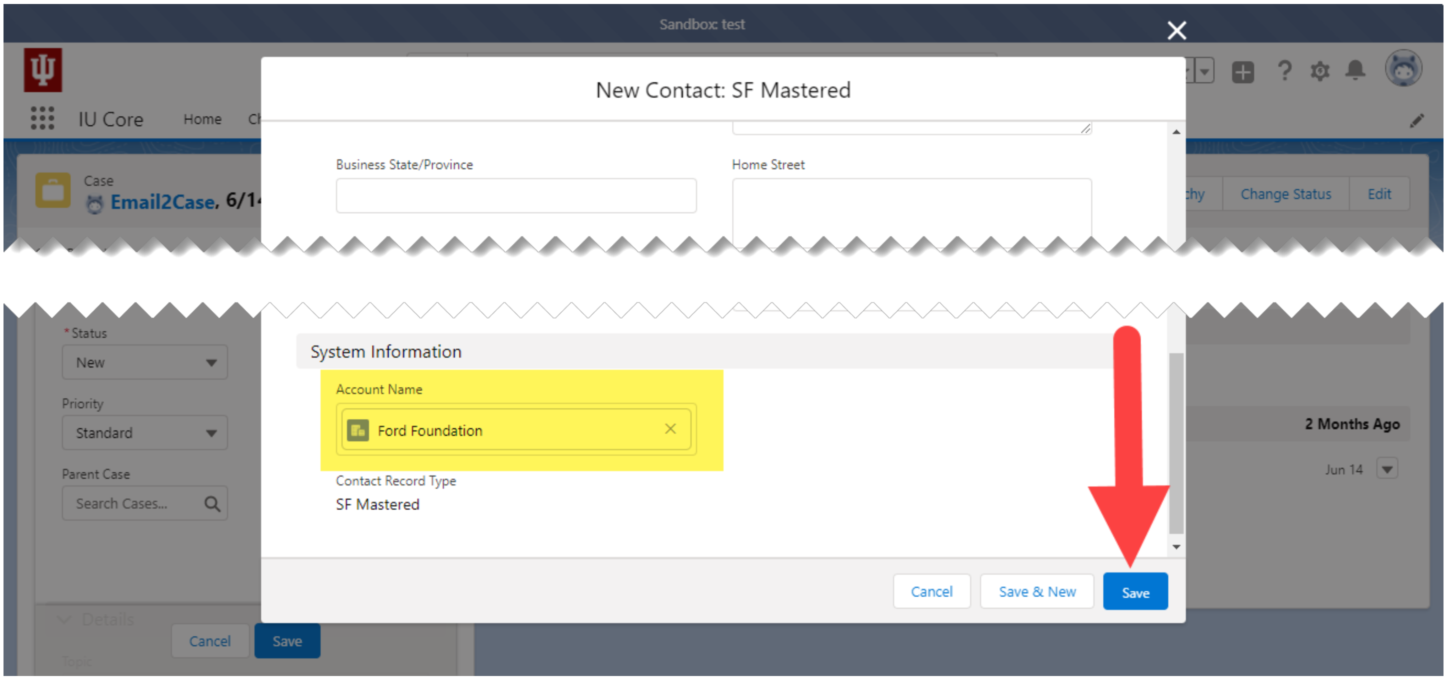
A new window opens. Enter as many details about the contact as possible. At a bare minimum you must enter:

- First Name
- Last Name
- Phone number (if at all possible)
- Email address



If the individual is a supplier contact, scroll to the bottom of the New Contact screen and search for the supplier's name in the **Account Name** field.

Once you've entered as many details as possible, click **Save** to save your work and create the contact.



Back on the case, click **Save** to save the new contact to the case.